ePM News

Welcome!

To the first issue of ePM News

Fred Doehring
Project Management Engineer

I am excited to bring you this first issue of **ePM News.** Through this newsletter I hope to bring you, the users of ePM, up-to-date information on the ePM system.

For quite some time I have been aware of the need for training and manuals for ePM and, really, for PPMS before that. Writing manuals and developing and delivering training is such a time consuming task that, unfortunately, we just haven't had the resources to do it. In contemplating this problem I came to the conclusion that the only way to get information to the users was with small, periodic, updates. That's what we will attempt to do with this newsletter.

Who is this newsletter for?

It is my intent to gear this newsletter to all ePM users; from the person that only uses the system for Payroll to the most experienced "Power Users". In addition to the latest, up to date, information on changes to the system, we will include articles on the basic operation

INSIDE THIS ISSUE

The Project Delivery List and You

Changes to Screen 710 give Project Managers more control over their projects

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With the recent introduction of the Project Delivery List (PDL) there has been a lot of concern about which projects appear on the list and when they are placed there. The ePM team has just completed some modifications to the system that will give the Regions more control over the PDL.

How the PDL was Assembled

Currently Elaine Fanning produces the PDL after the last run of each month. She produces it in Excel based on the results of a query of the ePM database. To determine which projects will be included on the list, the query performs a filter based on the project's PIN TYPE. This variable is found on Screen 710. If the PIN TYPE is set to "Local Governments" or "Railroad Related" the project will not appear on the Region portion of the PDL but Local Governments projects will appear on the Environmental page of the PDL (see sidebar).

The variable PIN TYPE is set by Program Development when the PIN is established. Program Development are the only users that have access to update that field. Until very recently we didn't think that PIN TYPE was used anywhere else in the system but in researching this problem we discovered that PIN TYPE is used in several calculations and reports. So it is important that PIN TYPE be kept current. As a Project Manager follows their project through the process, they should send Program Development (Bret Anderson) an email

of the system and possibly the theory behind it.

If you are an ePM user and you find that this newsletter is not useful to you, please let me know! If you have ideas for future articles or suggestions on ways to improve this newsletter, please let me know! We are committed to making this a valuable use of your time.

Who are We?

This newsletter is published by the ePM team. Below I will briefly describe each of our areas of responsibility.

Fred Doehring: I am the Project Management Engineer for the Department. The ePM team reports through me to the Director of Engineering Services (Jason Davis) who reports to the Project Development Director (Jim McMinimee). With regards to ePM my responsibilities include setting strategic direction for the system; that is, I determine what we need the system to do to help the Department meet its strategic goals. I also try to get the team the resources they need to accomplish their job. (Based on the above section, I must not be doing a good enough job on this one!)

Daniel Avila: Dan is the ePM Engineer. He is responsible for overseeing the day to day activities of the team. He assigns work and sets priorities. He also assists me in developing solutions for problems that we have identified. Dan works more in the administrative world than the technical programming world of ePM. If you have suggestions concerning improvements to the system, please contact Dan.

Rebecka Stromness: Becky is the Assistant ePM Engineer. If Dan's job is more administrative than technical, Becky's job is almost purely technical. She is the link between Dan and myself and the programmers (both in-house and consultant) that make the actual changes to the system. We tell Becky what we want the system to do and she figures out how to make it happen. She is also excellent at mining the database to get the data out of the system in a format that can be used. If you have any needs as far as custom reports, contact Becky. Also, if something is not working as you expect it to, let Becky know so she can fix it. She's always happy to help.

Griff Campbell: Griff leads our User Support team. He develops and provides training, backs up Elaine on the Help Desk, assists in testing new code before it is put into production, performs the MPS run every two weeks, and many other odd jobs. He and Elaine should be your primary contact for day to day operational issues with ePM

Elaine Fanning: Elaine, along with Griff, is the primary contact for our help desk. In addition to supporting the users, she has spent an incredible amount of time programming the Help system for ePM. The content (and value) of the Help system grows every week. If you haven't used the Help screens I really encourage you to try them. Elaine also spends a lot of her time compiling reports such as the Project Delivery List. If you have any problems using the system, contact Elaine by phone or e-mail for help.

Terry Redding: Terry is the only member of our team that is actually a Computer Programmer. He has worked on ePM since its inception and worked on PDPMS and PPMS before that. Terry is a wealth of information for the team on the inner-workings of the system.

This is the ePM team. If there is anything we can do for you, please don't hesitate to contact any one of us.❖

WHY ARE WE TRACKING LOCAL GOVERNMENT ENVIRONMENTAL DOCUMENTS?

When it comes to Design, Advertising, and Construction of Local Government Projects, we as a Department have decided that we will not measure ourselves against these projects. The consensus is that we, as a Department, do not currently have sufficient control over these projects.

Environmental Documents (EAs and EIS's), however, are somewhat different. To begin with, we generally have significantly more involvement with the preparation of these documents. In addition, the FHWA has a significant interest in these projects. There are also many members of the public and various resource agencies that are interested in the progress of these documents. For these reasons we have decided that these projects should be tracked on the PDL.

requesting that PIN TYPE be updated as appropriate.

How the PDL <u>will</u> be Assembled

Beginning with the May PDL we will use a different method of determining which projects will be included on the list.

When we wrote ePM we included some extra fields on Screen 710. These fields are labeled "Include in Project Delivery List" and "PDL Category". We just finished some work that will allow us to use these new fields in developing the PDL.

We have set the security so that Project Managers select the "PDL Category" and have the rights to click the "Yes" button on the "Include in Project Delivery List" field. When Elaine queries the database she will filter the data using the "Include in Project Delivery List" field. If the field has a value of "No", the project will not appear on the PDL. If the field is set to "Yes", she will sort the data based on the "PDL Category".

What do PMs Need to do?

Between now and May 20th all PMs need to update Screen 710 for each of their projects. We have run a script in the database which set the "Include in Project Delivery List" field to "No" and the "PDL Category" to "Blank" for every project in the system. If we were to produce a PDL today it would be empty (I know that probably doesn't break your heart!).

Each PM should go into Screen 710 for each of their projects and assign the appropriate "PDL Category". If the project is currently on the PDL or *should* be on the list, click "Yes" under "Include in Project Delivery List". Once you have selected the PDL Category and Yes, click on "Save". If for some reason you accidentally "Save" the screen with the "Include in Project Delivery List" set to "Yes" and you want it set to "No", call Elaine or Griff and they can reset it for you. The "PDL Category" can be changed at any time. This applies only to projects that have not yet advertised. If a project has advertised we will make sure it is on the PDL.

When Elaine begins compiling the PDL on May 24th she will only include projects with the "Include in Project Delivery List" field set to "Yes" so it is important that you get all your projects updated by the 20th.

How Will We Handle Projects in the Future?

The real advantage of this process is that PMs will be able to properly categorize each of their projects and determine when it will appear on the PDL. Here is the process we will follow in the future:

In the initial phases of a project the process will be the same. Program Development (Bret Anderson) will establish the PIN in ePM including assigning a PIN TYPE. They will not assign a PDL Category or set the "Include in Project Delivery List" field to "Yes".

When the PM picks up the project, they can assign the proper PDL Category. They will probably want to leave the "Include in Project Delivery List" field set to "No" for a period of time as they and the project team develop and refine the project schedule. Once the PM is comfortable with the project schedule, and specifically with the Project Advertising Date as found on Screen 645, they should click on the "Yes" button under "Include in Project Delivery List". After the next run we will capture the Project Advertising Date and save it as the "Committed Project Advertising Date" on the PDL. The next time the PDL is generated, the project will appear on it.

The PM should also check the PIN TYPE on Screen 710 when they first receive the project. If the PIN TYPE is not correct, contact Program Development (Bret Anderson) and ask him to correct it. This field is used in several calculations within the system. It is especially important that all Local Government projects have the proper PIN TYPE.

Giving the Regions What They Need?

These changes were based on feedback from several Regions and we sincerely hope that they address your needs. If not, please let us know! ❖